

Attachments, Enclosures, and Evaluations

Slide Purpose: To provide information on using and adding attachments/enclosures to military evaluations in My Forms (support and counseling forms, OER, and NCOER).

Focus: On the most frequently used attachments/enclosures. This is not all encompassing.

Presentation Assumptions: The reader already knows how to prepare support / counseling documents and evaluations in My Forms and knows basic policy for authorized attachments/enclosures or knows where to find it.

Policy & Uses for Attachments / Enclosures

Attachments or Enclosures can be used with support & counseling forms (67-9-1 & 2166-8-1) as well as with evaluations (67-9 & 2166-8). Those for OER & NCOER must remain within policy parameters.

Common uses for enclosures are:

NCOER Support / Counseling Form: Add additional pages to account for all of the tasks & actions or contributions when they don't fit on the space provided on the form (no policy limitations here).

OER Support Form: Add additional pages to account for all performance objectives or contributions when they don't fit on the space provided on the (no policy limitations here).

NCOER:

- 30 day minimum Waiver for Rendering a Relief for Cause
- Relief for Cause Directed by an Official Other than Rater Senior Rater
- Non-concurrence of the NCOER

OER:

- Relief for Cause OER directed by an Official Outside of the Rating Chain
- Supplemental Review
- Letter of Referral (note: only required when OER is not presented to rated officer and needs to be sent by another means.)

AR 623-3

references:

- para 2-17
- para 2-18
- para 2-19
- para 3-38
- para 3-58
- para 3-59

NCOER Support / Counseling Form

NCOER COUNSELING AND SUPPORT FORM
DA FORM 2166-8-1

Administrative Data | Rater Actions

Competence – Task/Actions

Enter Tasks or Actions relevant to Competence. Use this part of the form to enter what you expect the Rated Soldier to accomplish during the rating period. Provide clear objectives and results. If you need additional space, click ADD PAGE to add a continuation page. [CLICK HERE](#) for more information on continuation pages.

What rater expects rated Soldier to do in...
can be updated throughout the rating period...

[Bullet Formatting Guidance](#)

ADD PAGE

[View Form](#) | [Previous](#) | [Next](#)

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At the beginning of an evaluation period the rater (for an NCO) enters what he/she expects the rated Soldier to accomplish during the evaluation period.

When viewing a printed page these are the sections in the left hand column.

Raters can add a page if needed.

Task/Action tabs alternate with performance tabs along left edge.

NCOER Support / Counseling Form

U.S. ARMY **NCOER COUNSELING AND SUPPORT FORM** **DA FORM 2166-8-1** [Link to AR 623-3](#)

Administrative Data **Rater Actions**

Competence – Performance Summary

Enter the Rated Soldier's accomplishments relevant to Competence. If you need additional space, click [ADD PAGE](#) to add a continuation page within the wizard. For more information on continuation pages [CLICK HERE](#)

- o Duty proficiency; MOS competency
- o Technical & tactical; knowledge, skills, and abilities
- o Sound judgment
- o Seeking self-improvement; always learning
- o Accomplishing tasks to the fullest capacity; committed to excellence

Document what the rated Soldier did throughout the rating period.

Can be updated continuously.

Rater reviews prior to transfer to evaluation and places most important items in the "visible" section.

[Bullet Formatting Guidance](#) [ADD PAGE](#)

At least quarterly throughout & at the end of an evaluation period rater (for an NCO) enters what the rated Soldier accomplished during the evaluation period. Raters can add a page if needed.

Performance sections alternate with Tasks/Action tabs on left.

Additional Pages for NCOER Spt Form

The screenshot shows a web browser window displaying the U.S. Army Forms Content Management system. The header includes the U.S. Army logo and the text 'U.S. ARMY Forms Content Management'. Below the header, the section 'Leadership - Performance Summary' is visible. The main content area contains several lines of placeholder text: 'afudfalfsd', 'aldf,ladjs', 'a,lkdjf,aklsd', 'laksdjf,lasdj', 'alksdjf,lasdjf,al', and 'adsflkasd,flkjas'. A red box highlights the '<< PREVIOUS' button located at the top right of the form content area.

If the rater wants to add comments to an additional page to either section (the tasks/action or accomplishments), this is what it looks like.

Users return to the main wizard by selecting <<PREVIOUS at the top of the page.

Impact when using and preparing evaluations:

- Only what is visible on the NCOER form (not text typed onto additional pages) transfers over to a final evaluation when using the "create NCOER" function in My Forms (see slides on that task). Therefore, review all information and, prior to creation of a final evaluation, move the key & important items to the form so they will transfer over.
- On the Version 6.0 NCOER, text on additional pages does not print off when you print the counseling document. We are fixing this in future versions of the form.

Additional Pages for NCOER Spt Form

The screenshot displays the NCOER Spt Form interface. At the top, a green header bar contains the U.S. Army logo, the text "DA FORM 2166-8-1", and a link "Link to AR 623-3". Below the header, there are two tabs: "Administrative Data" and "Rater Actions". The main content area is titled "Leadership - Performance Summary". It contains a text box with the following text: "o Mission first", "o Genuine concern for Soldiers", "o Instilling the spirit to achieve and win", and "o Setting the example; Be, Know, Do". To the right of this text box is a larger text area containing the text: "What I have done:", "asdkfads", "akdjfhaksj'", "akdjfhaksdj", "akdsjfhkaj", "adksjfhalsd'ajkfhadskj fha", and "aksdjfhadsf". Below the text box is a button labeled "Bullet Formatting Guidance". To the right of the text area is a button labeled "EDIT PAGE", which is highlighted with a red rectangular border. On the left side of the form, there is a vertical navigation menu with the following items: "Army Values - Task/Actions", "Army Values - Performance", "Competence - Task/Actions", "Competence - Performance", "Physical Fit - Task/Actions", "Physical Fit - Performance", "Leadership - Task/Actions", "Leadership - Performance", "Training - Task/Actions", "Training - Performance", "Responsibility - Task/Actions", and "Responsibility - Performance".

U.S. ARMY

DA FORM 2166-8-1

Link to AR 623-3

Administrative Data Rater Actions

Leadership - Performance Summary

Enter the Rated Soldier's accomplishments relevant to Leadership. If you need additional space, click ADD PAGE to add a continuation page within the wizard. For more information on continuation pages [CLICK HERE](#)

o Mission first
o Genuine concern for Soldiers
o Instilling the spirit to achieve and win
o Setting the example; Be, Know, Do

What I have done:
asdkfads
akdjfhaksj'
akdjfhaksdj
akdsjfhkaj
adksjfhalsd'ajkfhadskj fha
aksdjfhadsf

Bullet Formatting Guidance

EDIT PAGE

After adding comments to an additional page and returning to the Wizard form, the user no longer sees an option to add a page. The function box now reflects an option to EDIT PAGE. Should you see EDIT PAGE, you know there is an additional page of information.

Additional Pages For OER Spt Form

DA FORM 67-9-1

Link to AR 623-3

U.S. ARMY

Administrative Data | Rated Soldier Actions | Review

Significant Contributions – Rated Soldier

List your significant contributions.

Performance Objectives

Army Phys. Fitness Data

Significant Contrib.

Unique Skill/ Areas Exper.

Branch/ Career Pref.

3 Future Assignments

Alert

Only 12 lines of text can be entered in this field. You may use the attachments feature in VIEW FORM for continuation sheets.

OK

OER support forms limit text but allows for attachments to document rated officer's accomplishments. Only text visible on the support form itself will transfer to the evaluation automatically. As the support form should accompany the final evaluation during it's preparation the rating officials should review the support form in its entirety (to include the attached pages) to glean relevant information for the final assessment.

FYI: We deliberately limited the space on the support form to that which is available on a final evaluation so this transfer action would not randomly truncate information

Additional Pages For OER Spt Form

The screenshot shows the 'OFFICER EVALUATION REPORT SUPPORT FORM' interface. At the top, there are buttons for 'WIZARD' and 'NEXT >>'. A red box highlights a dropdown menu labeled 'Attach External File(s)' with options: 'Attach Enclosure', 'Display Enclosure', 'Extract Enclosure', and 'Remove Enclosure'. Green arrows point from text boxes to these options: 'Add a document' points to 'Attach Enclosure', 'View what is attached' points to 'Display Enclosure', and 'Will ask, "Are you sure?" and at YES will drop the file.' points to 'Remove Enclosure'. Another green arrow points from 'Save a document to a separate location.' to the 'Attach Enclosure' option. The form itself has sections for 'PART I - R' (Officer Information) and 'PART III - VERIFICATION OF FACE-TO-FACE DISCUSSION' (Signatures and Dates).

OFFICER EVALUATION REPORT SUPPORT FORM
For use of this form, see AR 623-3; the proponent agency is DCS, G-1.

PART I - R

NAME OF RATED OFFICER (Last, First, MI) SSN
UNIT, ORG., STATION ZIP CODE OR APO, MAJOR COMMAND
PA

NAME OF RATER (Last, First, MI) SSN RANK POSITION
NAME OF INTER. RATER (Last, First, MI) SSN RANK POSI
NAME OF SENIOR RATER (Last, First, MI) SSN RANK POSI

PART III - VERIFICATION OF FACE-TO-FACE DISCUSSION

MANDATORY RATER / RATED OFFICER INITIAL FACE-TO-FACE COUNSELING ON DUTIES, RESPONSIBILITY
CURRENT RATING PERIOD TOOK PLACE ON (Date) Rated Soldier Initials R
PERIODIC RATER / RATED OFFICER FOLLOW-UP FACE-TO-FACE COUNSELINGS:
Dates Rated Soldier Initials Rater Initials Senior Rater Initials (Review)

- Additional pages are added to an OER support using an attachment. Go to Form View and select Attach Enclosure and browse to a document that is already created.
- As of 23 Apr 08 rated officers can digitally sign their support forms on page 2.

However, when a support form with attachments is signed by rated officer, the signature keeps the attachment from being viewed by anyone else (to include the person who attached it). We will fix this error in future form versions. A temporary solution, if rated officer has attachments, do not digitally sign. Or, you can delete rated officer signature & access

Adding Attachments/Enclosures: NCOER

On an NCOER / DA Form 2166-8 there is no visible block in the wizard to enter a number of enclosures to the NCOER. When you create enclosures in the wizard, a quantity will be added automatically and can be seen and verified in View Form mode before signing.

NCO EVALUATION REPORT
DA FORM 2166-8 [Link to AR 623-3](#)

U.S. ARMY

Admin/Auth Data | Rater Actions | Senior Rater Actions | Reviewer Actions | Rated Soldier | **Enclosures**

Administrative Data (Cont'd) – Rated Soldier

Is rated NCO Frocked to 1SG, SGM or CSM as of the thru date of the report? Yes ☐ No ☒

What is the Reason for Submission?

What is From Date? What is Thru Date?

Counseling Dates Initial Later Later Later

Rated Months NonRated Codes Rated Days

If you have non-rated codes to enter on this Soldier, click here [ADD NONRATED CODES](#)

[View Form](#) [Previous](#) [Next](#) Page 3 of 6

Adding Attachments/Enclosures: NCOER

Under the NCOER Enclosures tab the 3 most commonly used enclosures are visible. The instructions on this tab explain how to make it work: Select SELECT (note: what you get at this point can be seen on next slide), enter content as you need to, come back to the wizard, and put an X at “Add Enclosure.”

Enclosures

To edit an enclosure click "Select". To add an enclosure to the NCOER as an additional page, click "Add Enclosure".

Enclosure Type	Select	Add Enclosure
Thirty Day Minimum Waiver for Rendering a Relief for Cause	[Select]	[Add Enclosure]
Relief for Cause NCOER Directed by an Official Other Than Rater or Senior Rater	[Select]	[Add Enclosure] ☒
Non-concurrence of the NCOER	[Select]	[Add Enclosure]

Add External File(s): [Add] [Delete] [View] [Extract]

Note: you must place "X" in this box (for each enclosure) when using these preformatted enclosures. If not, they are not visible to HRC when you submit. You'll get the report back with error "missing enclosures." Just mark this box and HRC will be able to see them.

External Files: The other method is to create an enclosure as a document and attach it using the "add external file(s)" feature. The view button reflects a list of all enclosures added in this manner. The Extract button allows you to open, view, and save a specific attachment to a separate location.

Adding Attachments/Enclosures: NCOER

U.S. ARMY

SAVE SAVE AS PRINT EMAIL WIZARD

SOLDIER'S NAME (Last, First, Middle Initial)	UNIT	PERIOD COVERED FROM THRU
SOLDIER, FIRST M.	A Battery, 3295th XM Regiment, Fort H	20070301 - 20080201

1. Under the provisions AR 623-3, Chapter 3, type here for reason for relief.

Failure to repair, rendering false official statements, poor performance and failure to improve, failure to comply with all Army policy and regulation.

Had I used the spell check located at the top of each form I would have caught this error.

2. Point of Contact:

Phone Number:

Name:

Rank: Branch:

Duty Title:

SIGNATURE DATE

SWICORD.JAN.TIEDE.10543583 20080423

When creating an enclosure in the wizard, the information already on an NCOER will be filled in on the first line. Complete paragraphs 1 and 2 and digitally sign. Placing text/explanation in paragraph 1 will activate the "add attachment" box under the Enclosures tab, described on previous slide.

Adding Attachments/Enclosures: NCOER

The screenshot shows the NCOER system interface. The 'Attachments' window is open, displaying a list of folders under 'Present Folder: NCOER External File(s)'. The 'Add' button is highlighted with a red box and the number 1. The 'Attach' button is highlighted with a red box and the number 2. A file explorer window titled 'ATTACH: Choose File or Files' is open, showing the 'My Documents' folder. The file 'Eval NonRated Reasons Codes.doc' is highlighted with a red box and the number 3. The 'Open' button in the file explorer is also highlighted with a red box and the number 3.

Steps to Add External Files:

1. Select Add.
2. Select Attach.
3. Browse to a file, highlight it, and select Open

Adding Attachments/Enclosures

When users add enclosures, the form counts what is added and automatically places a number in Section 1: number of enclosures block. You can overwrite this number if necessary to reflect a correct number of attachments.

+ NCO EVALUATION REPORT						FOR OFFICIAL USE ONLY (FOUO) SEE PRIVACY ACT STATEMENT IN AR 623-3.		+			
For use of this form, see AR 623-3; the proponent agency is DCS, G-1.											
PART I - ADMINISTRATIVE DATA											
a. NAME (Last, First, Middle Initial) SOLDIER, FIRST M.				b. SSN 111-11-1111		c. RANK SGT ()		d. DATE OF RANK 20070301		e. PMOSC 92A00	
f.1. UNIT A Battery, 3295th XM Regiment, Fort Here, 22332		ORG.		STATION		ZIP CODE OR APO, MAJOR COMMAND		f.2. STATUS CODE 05		g. REASON FOR SUBMISSION Relief for cause	
h. PERIOD COVERED		i. RATED MONTHS		j. NON-RATED CODES		k. NO. OF ENCL 1		l. RATED NCO'S EMAIL ADDRESS (.gov or .mil) first.m.soldier@us.army.mil		m. UIC YEWAA	
FROM YEAR MONTH DAY 20070301		THRU YEAR MONTH DAY 20080201		11						n. CMD CODE 29	
										o. PSB CODE	
PART II - AUTHENTICATION											

Notes:

The form will NOT screen attachments to ensure they comply with policy. The form will allow any type of document to be attached (i.e., word, .pdf files, power point slides).

Common attachment errors found at HRC level: OER and NCOER with support / counseling forms or APFT cards attached to them. **Each unauthorized attachment must be deleted prior to submission to HRC.**

Adding Attachments/Enclosure: OER

Under the OER Enclosure tab 3 automatic enclosures are visible. They are created and added to the OER using the same set of steps just described for the NCOER.

OFFICER EVALUATION REPORT
DA FORM 67-9 [Link to AR 623-3](#)

Administrative Data	Rater Actions	Inter Rater Actions	Senior Rater Actions	Rated Soldier	Enclosures
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Enclosures

To edit an enclosure click "Select". To add an enclosure to the OER as an additional page, click "Add Enclosure".

Relief for Cause OER Directed by an Official Outside the Rating Chain	Select	☐ Add Enclosure	Remove
Supplemental Review	Select	☐ Add Enclosure	Remove
Letter of Referral	Select	☐ Add Enclosure	Remove

Add External File(s): [Add](#) [Delete](#) [View](#) [Extract](#)